PropertyIQ

Portal Release notes April 2020

Version 1.5

SUMMARY

1. **Client portal administrators - Portal control panel in PIQ – changes to document settings**- When a document that was previously set to auto publish for lot owner and/or committee member accounts subsequently has auto publish unticked, documents that were previously published to the portal for that document type will now be removed from the portal (previously unticking *auto publish* only removed future documents, not historical documents)
2. **Client Portal Administrators** - Sync history errors now show in error details
3. **Client Portal Administrators** – The sync error detail table now shows the batch ID of the sync.
4. **Client Portal Administrators -** An issue with lot documents not showing has been resolved. This was observed when an administrator used the "log in as user" function.
5. **Portal users – Document page**. When clicking on *Show more documents* from the documents screen, the sort order was not working. This has now been fixed.
6. **Portal users - Financials screen** – **request for financial reports** – Victorian buildings. The Request financial reports function will now only allow the user to request financial reports for schedules the user is associated with. For example, if a lot owner is associated with OC 1 and OC 3 but not OC 4, they will only be able to request financial reports for OC 1 and OC 3.
7. **Portal users – ledger sort function**
    a. Transactions are sorted by date descending (oldest at the bottom)
    b. Transactions are sorted by type
        i. The lot's opening balance shows at the bottom
        ii. If there is more than one receipt/levy due on the same date, then they're sorted by transaction number with the lowest number at the bottom, then sorted by description PPD 3403
8. **Portal users – Lot Documents - receipts** - An issue with receipts showing prior to the lot's last settlement date (where one was entered on the lot card) has now been fixed. **Note:** If the lot owner is also a committee member and their committee appointment **predates** their last settled date (an unusual scenario) receipts are still showing from their appointment date.